



Vendor Conversation Guide

Better questions lead to better technology decisions.

Strategic Stack for Good

Where nonprofit mission meets modern infrastructure.

Software conversations can move quickly toward features. The purpose of this guide is to understand whether a platform can solve the organization's problems realistically, affordably, and sustainably.

Use selectively: Choose the questions that matter to your evaluation. Ask vendors to demonstrate your process, not a generic scenario.

Before the meeting

Our organization:

Approximate users:

Primary challenges:

Critical systems that may need to integrate:

Our desired outcome:

Three must-haves

1.

2.



3.

Three concerns

1.

2.

3.



During the conversation

Product Fit

- Show us how someone would complete our actual process, rather than a generic demonstration.
- Which requirements require customization?
- Which require third-party products or integrations?
- What important functionality is not included in the proposed package?
- Which features shown today cost extra?

Implementation

- Who is responsible for implementation: the vendor, a partner, or our organization?
- What work will our staff be expected to complete?
- What commonly causes implementations like ours to run into trouble?
- What decisions must we make before implementation begins?
- How are scope changes handled?
- What does implementation completion mean contractually?

Data Migration

- What data can and cannot be migrated?
- Who cleans and prepares the data?
- Who validates migrated data?
- How many migration and test cycles are included?
- How will historical information be handled?

Integrations

- Is each integration native, third-party, or custom?
- Is there an additional subscription or implementation cost?
- Who supports the integration when something breaks?
- Is an API available, and is API access included?

Security and Data

- Where will organizational data reside?
- What authentication and access controls are supported?
- Are audit logs available?
- What backup and recovery capabilities are provided?
- How can we export our data?
- What happens to our data if the relationship ends?

Training and Support

- What training is included?
- Is training live, recorded, self-service, or combined?
- What does ongoing support include?
- What support hours and escalation paths apply?
- What happens after implementation support ends?
- Is there an active customer community or knowledge base?

Pricing

- What is the first-year total cost, not just subscription cost?
- What should we expect in subsequent years?
- What triggers a pricing increase?
- Are storage, integrations, support, API access, environments, or reporting separate?
- What costs are commonly overlooked by new customers?

Contract and Future

- What is the initial contract term?
- How does renewal work?
- What should we know about cancellation or non-renewal?
- How are product or service changes communicated?
- How do customers influence the product roadmap?

Security requirements should also be reviewed by the appropriate technical, privacy, legal, or compliance resources for the organization.

Before ending the call

Ask one final question: Based on what you have learned about our organization today, where might your solution not be a good fit for us?

Immediately after

Before discussing opinions as a group, have every evaluator independently record:

Strongest fit:

Biggest concern:

Unanswered question:

Unexpected cost or dependency:

Overall confidence (1-5):



About Strategic Stack for Good

Where nonprofit mission meets modern infrastructure. Strategic Stack for Good shares practical guidance and tools for nonprofit leaders navigating technology, operations, organizational change, and the decisions connecting them.

These resources are designed to help organizations ask better questions, create clarity, and make more thoughtful decisions.

When the questions get complicated

Some technology challenges can be solved with a good worksheet. Others benefit from another perspective. Stack for Good Advisory offers independent conversations for organizations working through technology strategy, system evaluation, integration questions, change readiness, and organizational priorities.

Learn more: stackforgood.blog

These resources provide general educational and planning guidance. They are not legal, financial, cybersecurity, privacy, or regulatory advice. Organizations should consult appropriately qualified professionals when decisions require specialized expertise.